

Federation-Agency Relationships: Responsibility of Agency Executives

Charles Miller

Philadelphia, Pennsylvania

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It is the purpose of this paper to consider the role and responsibilities of agency executives in the area of Federation-agency relationships. To some it may seem presumptuous for a Federation professional to attempt this task, but it seems to me that it has validity because a major objective is to strengthen the position of service agencies within the Federation framework. I make the basic assumption that Federation-agency relationships largely depend upon the relations between the executive staff of Federations and agencies.

For this discussion I have reviewed all the papers on this subject published in this Journal since 1948. There aren't very many. What struck me most forcibly was that whenever the subject was discussed by agency executives, it was almost always in terms of Federation responsibilities or shortcomings. Rarely was there reference to the role and responsibility of agencies, or to what specific things agency executives might do to build and improve relationships. I therefore felt it was time that this element was at least introduced for professional consideration, even if only from the Federation viewpoint.

This paper will not deal with certain traditional factors and tensions associated with Federation-agency relationships. These include the personalities of executives, the shortcomings of Federation structure and process, the inadequacies of lay leadership, etc. A certain amount of tension is inevitable in any situation where there is control of funds in relation to agencies. I have clearly stated my position in other papers that the primary responsibility for appropriate structure and process in Federation-agency relationships

rests with Federation. This paper will focus on the responsibilities of agency executives, and on the basic professional considerations which relate to more effective executive functioning within the Federation system. In this connection, I believe that certain historical considerations continue to play a major role in the current problem, and therefore warrant some further discussion.

Historical Notes

The Jewish Federation came into existence about 1900 to bring order into the financial chaos of fund-raising among thousands of agencies. To this day, fund-raising and the coordination of fiscal effort remain a major and often overshadowing Federation responsibility.

With the professionalization of social work, which began in the twenties, the role of agency executives became dominant in all service fields. They became the primary movers in the determination of agency policy, function and service. They represented the new technocracy, with its focus on method, skill and quality of service. They have been the major influence on attitudes of agency Boards and in the development of agency image. Although the early years of Jewish communal service were suffused with ideological emphases, the professionalization of the field practically eliminated these emphases, and the focus on technical aspects continued right up through the forties and fifties. Agency executives were and still are employed as technical people to do a technical job. They saw and continue to see their relationship to Federation as primarily a fiscal one, and this has been accepted as

normal by most Federations.

I have pointed out elsewhere that since 1933, certain forces and impacts overseas and in this country, have been significantly affecting the ways in which Federations conceive of their role and responsibilities in relation to agencies and services.¹ There has been a marked shift to a consciousness of the need to plan, to develop central communal objectives, and to relate agency functions and progress to these objectives. The fact that this change is gradual, subtle and not always clearly articulated does not lessen its reality.

In my experience in many communities, I have seen that it is the nature of that change which is not understood by many agency executives, and even where it is sometimes dimly perceived, it is not often accepted. The essential element in that change is ideological, in which the Federation, as the central community organization, sees itself as having a primary mission for the survival and preservation of Jewish life and community in this country. The threats to that survival are serious, as seen in the weakening sense of Jewish identity, the alarming rate of intermarriage, and zero population growth. There is slowly crystallizing a sense of mission, in which agencies are being increasingly viewed as community instruments which will merit support to the extent of their relevance to central communal objectives. From this viewpoint, relationships with agencies will be defined in the future not so much in terms of financial support, but also in terms of how they identify with and support the ethnic system of which they are an integral part. It will therefore be essential to effective executive functioning to understand that system and to be able to operate skillfully within it.

The Political Aspect of Federation

In addition to this newer ideological emphasis, there is another basic aspect of Federation which is often not clearly under-

stood and accepted by agency executives, and that is what I refer to, for want of a better designation, as the political aspect of Federation. My experience in more than thirty Jewish communities of all sizes has convinced me that this lack of understanding is a major reason for the development of tensions between Federations and agencies. Because of its importance, I'd like to clarify what I mean by the "political aspect of Federation".

The literature of Jewish communal service contains very few references to the politics of Federation or the Jewish community generally. Those we do find are almost always made in pejorative terms, with the implied or stated view that the element of politics in Federation is an unnecessary evil. Events of recent years, particularly in government, have strengthened negative attitudes toward anything seen as political. Politics implies deception, fraud, corruption, misuse of power, and manipulation. I wish to suggest that this judgmental attitude tends to becloud and confuse certain basic realities about the Jewish Federation.

The phrase "political aspect" as used here refers to a normal feature of Federation, requiring the same understanding and skill which is essential in all areas of effective professional activity. It is necessary to stress that the words "politics" and "political" are sociological terms referring to relationships between people and establishments. Wherever there are people, as individuals or in groups, who need and want things, and there are organizational structures that have the power to provide those things, there is politics. While Federations have no official power over groups and individuals in the public and civic sense established by law, by virtue of their control of funds they exert tremendous influence over programs which affect the lives of many institutions and large numbers of people, directly and indirectly. Any organization with such influence is very much in the business of politics.

It is interesting to note that while the professional literature of community organization and planning often refers to certain roles which are necessarily assumed by the

¹ Charles Miller, "Changing Dimensions in Federation-Agency Relationships," *Journal of Jewish Communal Service*, Fall, 1976, p. 15-20.

professional, these roles are not referred to as political, nor are the skills they require described as political ones. For example, the administrator, community organizer and planner may be seen as diplomats, negotiators, arbitrators, leaders and compromisers, but the skills required for these roles are understood as those of professional social work. I believe that it would be more appropriate to see these skills as both professional and political. There is abundant empirical evidence that many social workers and educators who are knowledgeable and skillful in many professional ways, are often naive and inept politically; that is, in the area of activity which attempts to influence institutions, power people, decision-makers, and others who determine the allocation of resources, priorities and major social policy.

I'm not quite sure I can adequately explain what I mean by the quality of political skill. It has to do with a special way of using oneself in relation to people in positions of power. To give an example:

Some years ago I was employed by a Federation in which the executive was an extremely strong, able and effective person. He was not a particularly warm or likeable individual. He tended to be forceful, highly opinionated, domineering, rather insensitive, and somewhat contemptuous of process. Most of the agency executives found it difficult to deal with him and their contact with him was limited to essentials. All of these executives were able men and women of substantial professional stature.

One agency executive was able to establish a good working relationship with the Federation executive. He (the agency executive) was universally liked and respected by lay people and professionals. With power people he demonstrated unusual sensitivity and flexibility, and was able to bring a number of them on his Board and keep them there. There was a certain shrewdness in his ability to evaluate and deal with decision makers. He was able to relate to them on their terms, to defer to their power and status with no compromise of his own personal and professional dignity. He was

able to "talk their language" and was one of the few executives whom the Federation executive couldn't bully and accepted as an equal. Although he respected the Federation executive's strength and ability, he felt no real warmth or liking for him. Although his efforts were completely deliberate and manipulative, he was able to create a relationship of mutual respect, and to maintain consistent communication and exchange of views which proved to be extremely helpful to the agency. I can only describe this quality as one of political skill.

To my way of thinking, political skills are not essentially different from normal social work skills. They have to do with relationships, and in a world filled with political elements, such skill can only enhance the human causes we serve.

I call particular attention to the fact that nothing I have written implies any compromise with sound professional principles and practices. It is a commonplace of knowledge that dealing with power structures requires special kinds of know-how. Such know-how may be considered as political, but that does not remove it from the sphere of sound professional functioning.

Politics is People

If one understands that there are political aspects in Federation that have to be dealt with, then one also presumably understands that one is dealing with people. And yet; those of us who are in and of Federation often find that colleagues constantly criticize Federation because it does not conform to some preconceived logical system or to viewpoints, principles, norms, policies or priorities which seem reasonable to them. One has the impression that they conceive of Federation as a place where only rationality and purity of motive should prevail. They seem to find it difficult to understand that Federation, like all institutions, is only people. Federation people are like all other people, with viewpoints, needs for status and power, biases, ideologies, loyalties, favorite causes, and a wide variety of interlocking relationships of a personal, social, political, business and professional

nature.

It is true that the best leadership tends to be relatively objective, judicious and knowledgeable. That we often have such leaders is attested to by the success, viability and stability of the Federation movement for eighty years. But it is absurd to assume that all of the complex factors which motivate people do not also influence Federation leaders.

Some Implications for Action

If Federation is a power structure with political aspects, and political aspects express themselves through people, it follows that the most effective approaches to Federation by agencies should be made through people. This may sound trite and obvious, and yet it is a proposition which is honored more in the breach than in the observance. It is an unfortunate fact of Jewish communal life that many agencies do not use people appropriately in their relationships with Federation. There is a surprising lack of awareness of the factors which enter into the creation of the image of the agency in the eyes of a power structure like Federation.

Agency Image and Board Composition

Whenever an agency presents a request for funding to an allocating agency, a subtle but very real factor in its request is the image projected by the agency representatives, both lay and professional. This is particularly true in dealing with Federations, which is a well defined system in which who is or is not a leader depends to a certain extent upon what one does within the total system. And yet, agency executives often seem to be unaware of this, or if they are aware of it, are apparently unimpressed with its importance. On the many occasions I have been called in by a Federation to deal with some aspect of Federation-agency relationships, I often found that Federation had a negative image of one or more agencies. That image arose primarily from the fact that agency leaders, both lay and professional, were conspicuous by their absence in certain major areas of Federation activity. These leaders failed to demonstrate an identification

with and support of Federation campaigns; they exhibited a general attitude which, in the eyes of Federation leadership, implied that their only interest in Federation was a source of financial support.

This situation is of particular interest in view of the fact that many Federations have leadership development programs which prepare people for board participation. Even where they do not, there are always active community people who can be recommended by Federation and who will accept invitations to serve on agency boards. Many executives still have to learn that living with Federation is easier when their boards consist of people who are active in Federation and the general community.

I do not for one moment suggest that board composition will be the primary determinant of the degree of financial support by Federation. I do suggest that agency image, particularly in the aspect of board composition, can be a vital factor when certain crucial community policy actions are under consideration. It may express itself in subtle, unconscious or overt ways, but I have seen it operate in relation to such questions as the basic welfare fund formula on the allocation to overseas, national and local agencies; in the decision to increase or decrease the amount for local services in particular years; or whether to take money "off the top" for a new service at the expense of existing services.

One finds that within Federation, when these vital policy questions come up for discussion, the interpretation of the importance of local services is often in the hands of the Federation professionals. No matter how well intentioned or skillful these professionals may be, they cannot have the influence of lay leaders who have close relationships with the Federation decision-makers, and who by virtue of these relationships exert substantial influence of Federation thinking.

Professional Role

I am aware that to discuss the role of agency executives in Federation-agency relationships

is truly to step in where angels fear to tread. There is no subject more taboo in the fields of social work and Jewish communal service. Papers on this subject are simply not done, and for obvious reasons. Executives are powerful people, directing major services, influencing job placements and board and community policies. And yet, we will not deal adequately with the problem of Federation-agency relationships unless and until all significant aspects of this problem are thoroughly aired and analyzed in the area of professional discussion, and the most significant aspect of all is the role of agency executives.

It is a commonplace of knowledge in the Federation field that as goes the executive, so goes the board. It is also a fact that the great majority of agency executives still do not yet understand or accept the basic proposition that central community planning is the wave of the future; that central community service objectives will determine service priorities in the years ahead; and that agencies which depend upon Federation support for a viable existence will have to relate themselves to these realities.

To us in Federation it is no accident that many executives rarely exhibit by their actions an identification with and support of the Federation agenda. To our way of thinking, it is no accident that people identified with Federation are not placed on boards; that agency board and staff people are notoriously poor contributors in relation to their incomes; that Federation objectives and policies are rarely interpreted properly and supported adequately. It is most unusual for executive staff to take active roles in the welfare fund or United Way campaign or help recruit leadership for them. One does not often see staff on a campaign speakers bureau or in some other volunteer capacity. And yet, in many ways it is the executive who represents the agency in the Federation and in broader aspects of community work. Too often are agency executives identified as those who spend the money, but who do little or nothing to help raise it.

My experience with many colleagues on the

executive and sub-executive level indicates that to point the finger in relation to fund-raising raises their hackles. The reaction is often akin to that of many intellectuals in Jewish life who sneer at what they consider the crass materialism and unprofessional and undignified methods and climate of fund-raising. They think of fund-raising as an onerous and distasteful chore. They resent the pressure to contribute more than they wish to. They are not aware that they often project an image of being inadequate contributors in relation to their income. All of these facts project a particularly negative image because executives are in the forefront of demand for increased funds for their agencies. They see no contradiction to this, but to Federation leaders it is a palpable paradox.

All of these and related attitudes demonstrate a lack of understanding of the role of the campaign in the Federation world. Such a lack may be understandable in those who are not in and of the Federation system, but it is not acceptable in those whose very existence as agency leaders depends upon campaign success.

There are other ways in which the attitudes and actions of agency executives are not helpful in Federation-agency relationships. There is the frequent insistence upon the mythical quality of "agency autonomy" in the areas of program and service; in the attacks upon Federation planning when Federation priorities do not jibe with their own; in the half-hearted cooperation given in areas of coordination where full cooperation is essential and in their readiness to convert valid sectarian services to non-sectarian ones because public money is available. This latter point is sufficiently serious to merit further consideration.

The desire of an agency executive to keep his agency in a sound fiscal position is understandable. In many instances the inflow of public funds has made possible the creation of urgently needed additional services. The issue is therefore not one of opposition to the use of public funds. It is rather that many executives have accepted such funds with the full

realization that they may be compromising the integrity of certain traditional services which are deeply rooted in the Jewish religious and moral ethic, which are appropriate for voluntary sectarian sponsorship, which contain Jewish religious and cultural elements, and which are directed to Jewish clients.

From the point of view of Federation, such a movement into non-sectarian dimensions at the expense of vital Jewish services goes far beyond questions of money and agency autonomy. It is destructive of basic Jewish communal values. It seriously weakens Jewish institutions which are symbols and rallying points for Jewish communal efforts. Since these movements into non-sectarianism are led by agency executives, Federation lay and professional leadership are compelled to assume that the executive does not have a significant commitment to Jewish life and the stability of the Jewish community.

The Ideological Dimension

The movement toward non-sectarianism is but another expression of the more basic fact that professionalism tends to minimize and eliminate ideological considerations. Every social critic of note—Ellul, Marcuse, Reich, Mumford—has pointed out that focus on technique and expertise tends to neutralize ideology and spirituality. In the technological world professionalism as such becomes the ideology, reducing us to one dimensional people who are basically uncomfortable with such dimensions as ethnicity and religion. The commitment is to professional objectives of service quality and skill, to program and expanding budget. There is no need, much less awareness, of issues unrelated to these professional considerations. At least, that has been the traditional concept of professionalism.

But this is changing. We are beginning to experience a new consciousness of who and what we are as Jewish professionals. We are part of a growing awareness that professional dimensions are not sufficient for the fullest realization of ourselves as people; that personal identity is strengthened, enriched

and given meaning by the sense of community and ethnic group consciousness. We become aware that the sense of ethnic identity and purpose strengthens our professional objectives and functioning, and that sound professionalism in any ethnic framework must stem from the needs and purposes of the ethnic group.

I have no wish to denigrate a valid and necessary professionalism. We must be able to render the highest possible level of professional service. But the challenges of the future in the Federation system are such that the definition of a good professional will include positive commitment to the principles intrinsic to that system. The Jewish agency executive of the future will have to be an embodiment of these principles, because no alternative will be acceptable to Jewish communities.

Conclusion

In this paper I have dealt with the special role and responsibility of agency executives in the area of Federation-agency relationships. I have attempted to remove the subject from the traditional arena of personalities and the specifics of structure and process in individual communities. I have ascribed a good part of the problem to the limitations I have found among agency executives, those limitations stemming from a lack of adequate understanding of the forces which are shaping the philosophy and functioning of the American Jewish Federation, and from the poor image which agencies often present to Federation.

The challenges facing our Jewish communities are serious ones. They can be met only by combining all our best thinking and resources. This requires the closest possible relationships between agencies and Federations, and it is the executives who carry primary responsibility for those relationships. While leadership must be taken by the Federation executives major responsibility also rests with agency executives. The record shows that up to this point, many of them have not dealt adequately with the challenge.

The challenges to agency executives are equalled by the opportunities. It is true that

not all agency functions and services will be relevant to the central communal purposes of the future. But to those that are, or that can be directed into such relevance, the future is indeed bright. They will benefit not only financially, but will be secure in the knowledge that they have become integral and inseparable

parts of Federation and the Jewish community. For those executives who help to make that achievement possible, there will be the rich personal reward of knowing that they have contributed significantly to the quality and survival of Jewish life.